



Interested Party Authorization

Please complete the information below if authorizing an Interested Party other than yourself or your designated financial representative (including, but not limited to, broker, financial planner, accountant, attorney) to receive information about your account. **Please note that this individual will have limited access to your account information.** Pacific Premier Trust will not accept purchase and sale instructions from this individual.

Those who are designated as an Interested Party by the Account Owner may not be a sponsor of or otherwise affiliated with an investment in the Account. It is the responsibility of the Account Owner and the Interested Party to review the Account assets to ensure compliance with this provision and to take steps to remove an Interested Party from the Account in the event of non-compliance.

This form authorizes Pacific Premier Trust to provide account information and electronic statements to the individual referenced below. If the Interested Party is associated with a broker-dealer, financial exchange or a regulated investment advisory firm, Pacific Premier Trust may make information about Account activity available to the broker-dealer, exchange or compliance officer for the advisory firm as they deem necessary to receive such information.

By signing this Authorization, if any controversy, claim or dispute arises relating to the release of or providing account information, **I agree to release, indemnify, defend and hold Pacific Premier Trust and its related entities harmless.**

ACCOUNT OWNER INFORMATION *(all fields are required unless otherwise stated)*

By checking this box, I request and authorize that any existing Interested Party (IP) on my account be replaced with the IP listed below.

1. Account Owner

Name *(first, mi, last)*

Pacific Premier Trust Account Number(s)

2. Interested Party

Name *(first, mi, last)*

Firm Name *(if applicable)*

Address

City

State

Country

ZIP code

Primary Phone

Type: Cell Home Business

Email

Account Owner Signature

Date

NON-DEPOSIT INVESTMENT PRODUCTS ARE NOT INSURED BY THE FDIC; ARE NOT DEPOSITS OR OTHER OBLIGATIONS OF, OR GUARANTEED BY, THE BANK OR ANY OF ITS DIVISIONS; AND ARE SUBJECT TO INVESTMENT RISKS, INCLUDING POSSIBLE LOSS OF THE PRINCIPAL AMOUNT INVESTED.

Upload forms to: www.PacificPremierTrust.com/upload
Fax to: 303-614-7034

Send mail to:
Pacific Premier Trust
Processing Center
P.O. Box 173859
Denver, CO 80217-3859

For express deliveries:
Pacific Premier Trust
Processing Center
1560 Broadway, Suite 400
Denver, CO 80202-3331

Questions?
Call 800-962-4238
clients@PacificPremierTrust.com